

User Guide

Managing Cards

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MANAGING CARDS

The card file in MYOB is more than just an address book, they can help small businesses achieve a better visibility of their relationships with customers, suppliers and employees helping them develop new opportunities. The MYOB card file screen can be fully customised to provide a more comprehensive view of the business contact details. New customised fields can be added to tailor the specific business requirements and communication can be recorded. Finally, data can also be dynamically exported to Microsoft Excel to create bulk mail outs and announcements.

CUSTOMIZING THE CARD SCREEN

The Cards List screen can now be fully customised to show more information about customers, suppliers and employees. There are more than 40 columns of data to choose from. Any fields added to the card screen can then be searched for and used to filter and group card information. [Watch the video.](#)

SETTING UP CUSTOM LISTS AND FIELDS

Custom lists and fields allow to record additional card information specific to a business. For example, sorting customers according to their business classification or marketing source or recording employee emergency contact details. By using custom lists, reports can be filtered more effectively.

USING THE CONTACT LOG

The contact log enables businesses to keep a detailed log of all types of correspondence with their customers, suppliers and employees. When a customer or supplier calls, the contact log can be used to retrieve a complete history of the business relationship with that contact. Reminders can also be set up which appear on the To Do List.

COMBINING CARDS

Customer and Supplier cards can be combined to solve the issue of duplicate card records. When cards are combined, the non-transaction card information for the primary card—such as card name, address, buying and selling details—is retained as the default information for the combined card. The transaction details for the secondary card, including outstanding balances, are added to the primary card. Non-transaction information for the secondary card is deleted.

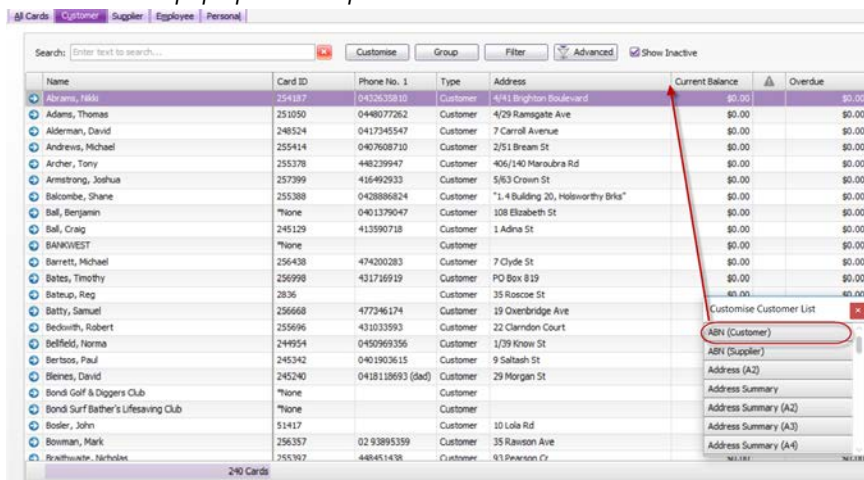
EXPORT CARDS TO MICROSOFT EXCEL

Card details can be exported out of MYOB AccountRight Live and subsequently amended in Microsoft Excel. The data exported can then be used to create bulk mail outs and announcements or to be imported to marketing mail out software like Mail Chimp.

How to customise your card screen

ADD COLUMNS TO THE CARDS LIST SCREEN

1. Go to Card File → Cards List
 - ➔ *The Cards List screen opens*
2. Click on [Customize]
 - ➔ *The Customize pop up screen opens*



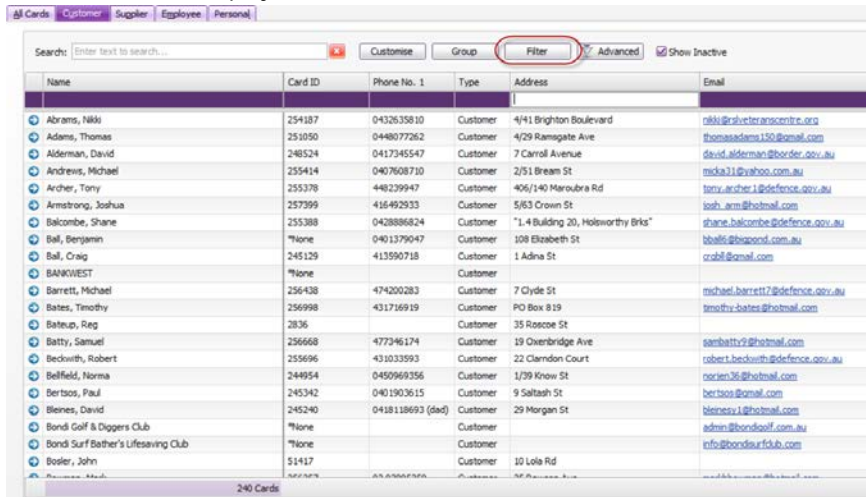
3. Select the field you wish to add to add to the Cards List screen and drag it to the screen column header
 - ➔ *The selected card field is added to the card's list screen*
 - Note:** *Customer, Suppliers and Employee cards list screens can be each tailored with different information fields.*

SEARCH FOR CARD'S INFORMATION

After you add extra information fields to the cards list screen you can now search by any of these fields.

- Click on **[Filter]**

➔ *The search bar is displayed on the cards list screen*

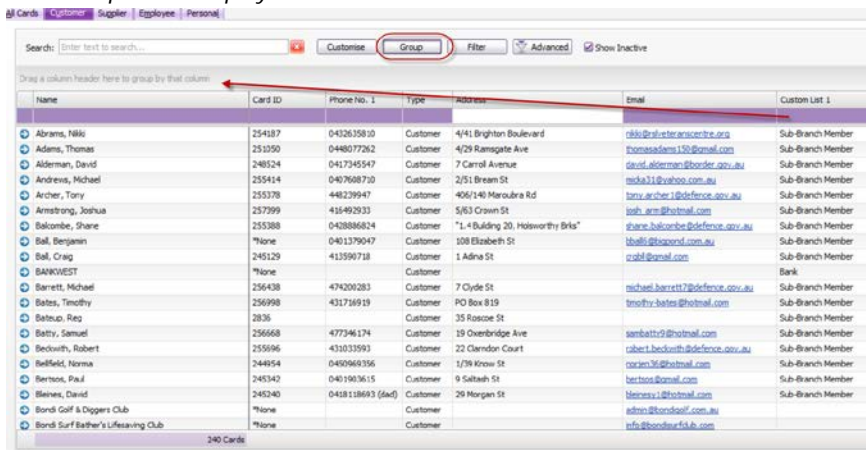


- To search for information type in the search bar on the relevant column

GROUP CARDS INFORMATION FIELDS

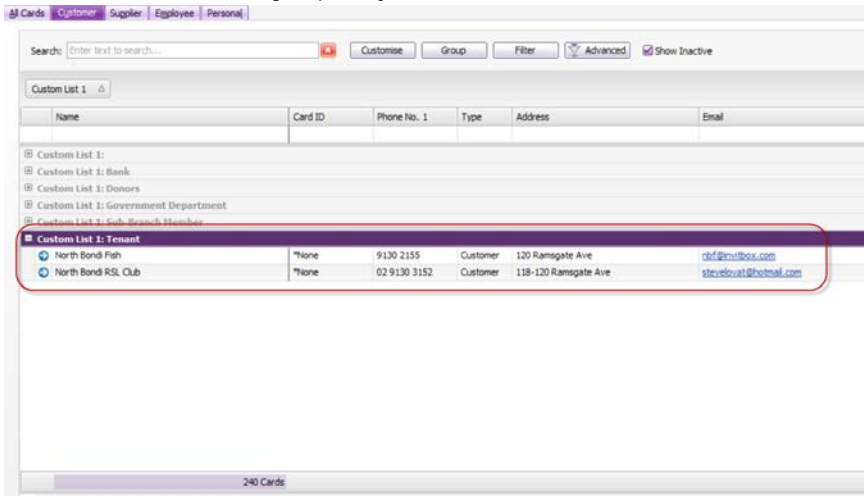
- Click on **[Group]**

➔ *The Group bar is displayed on the cards list screen*



- Drag the column header to the group bar

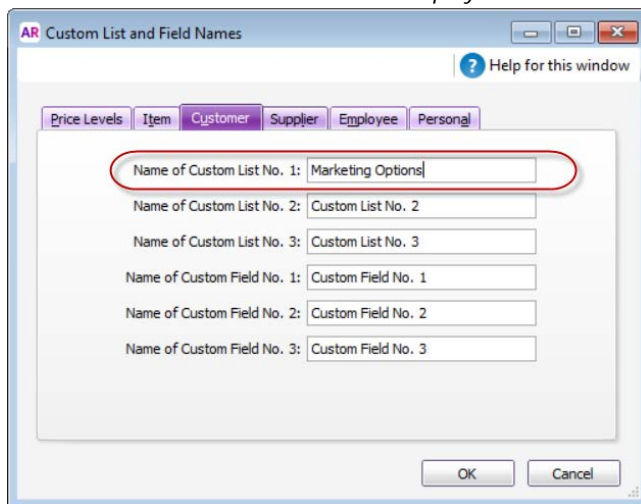
→ The Cards List screen is grouped by the card information selected



How to set up custom lists and fields

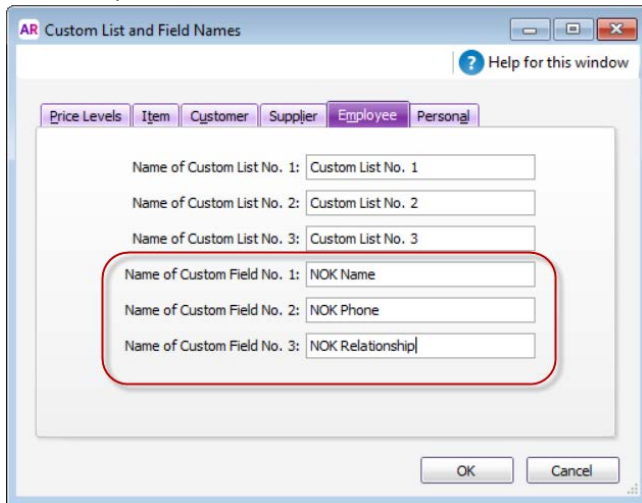
1. Go to Lists → Custom Lists and Field Names → Customers/Suppliers/Employees (choose one)

→ The Custom List and Field Names is displayed



2. Change the name of the custom list/fields accordingly
3. Repeat the above process for all Cards field names/lists

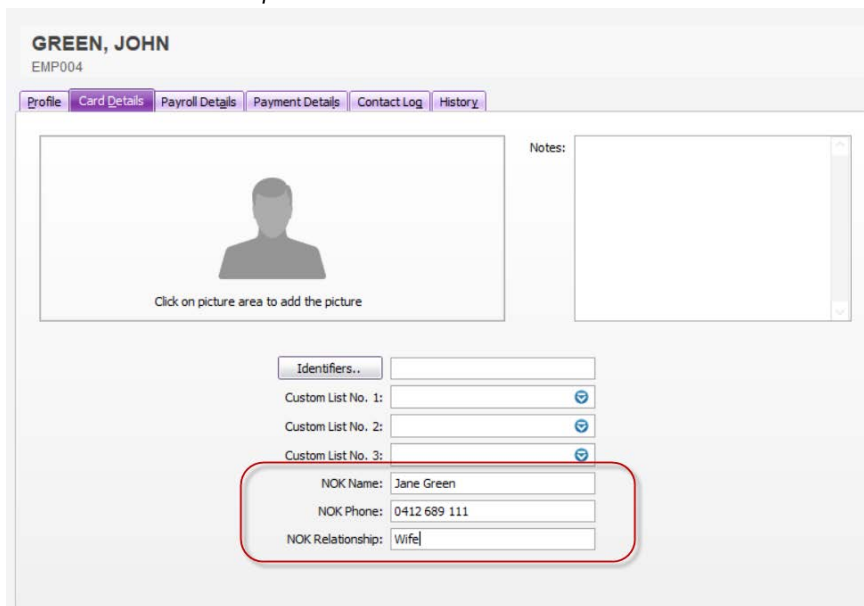
➔ All fields update names



ADD VALUES TO CUSTOM FIELDS

1. Go to Card File ➔ Cards List

➔ The Cards List screen opens

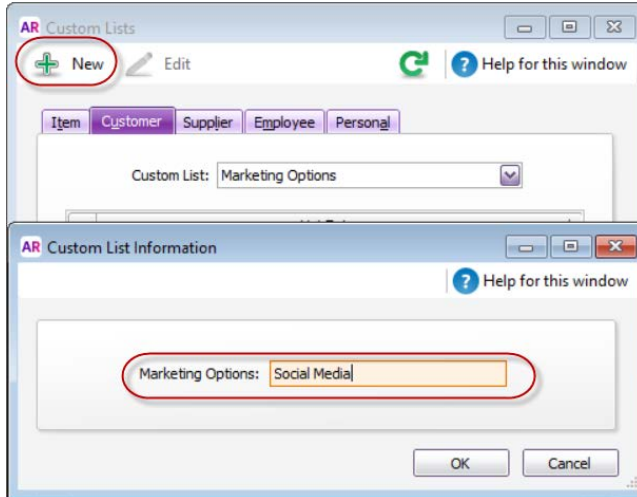


2. Open the relevant card and select the [Card Details] Tab
3. Enter the custom field details
4. Click on [OK]

ADD VALUES TO THE CUSTOM CARD LISTS

1. Go to Lists → Custom Lists → Customer/Suppliers/Employees (choose one)

→ *The Custom Lists screen opens*

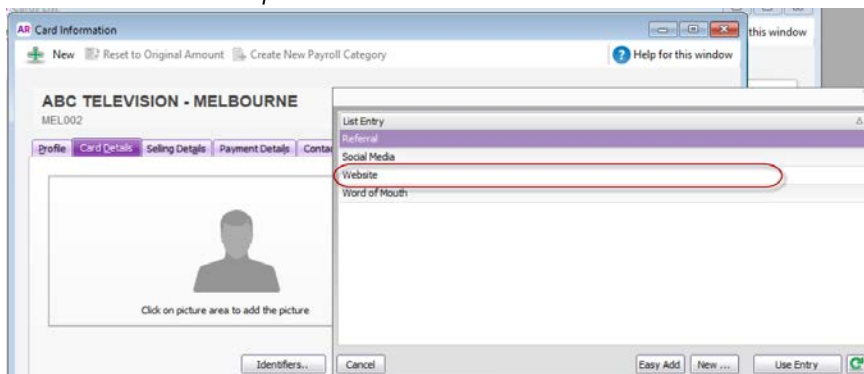


2. Click on [New]
3. Enter the custom list value
4. Click on [OK]
5. Repeat the above process to add all options

ASSIGN CARD LIST VALUES TO CARDS

6. Go to Card File → Cards List

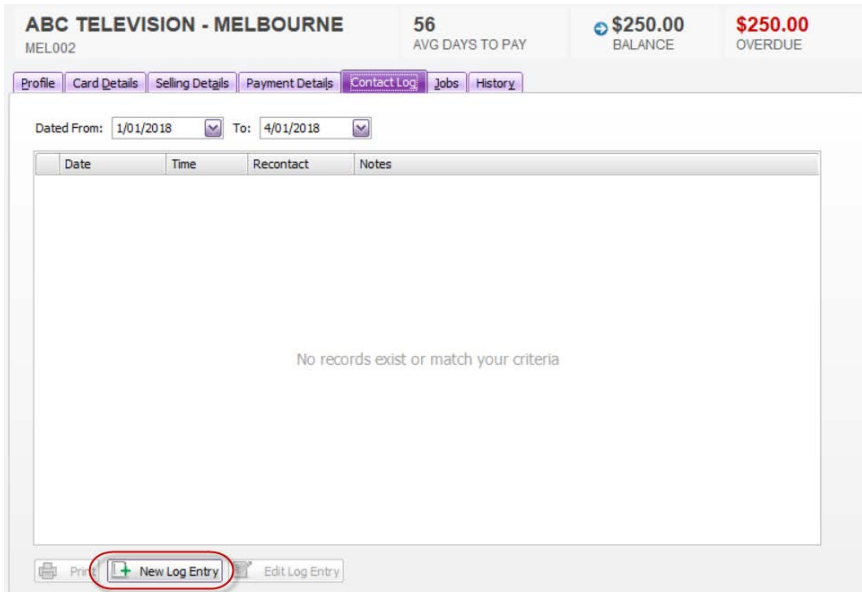
→ *The Cards List screen opens*



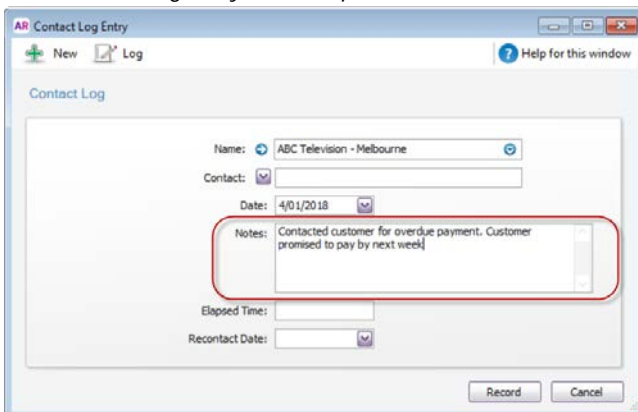
7. Open the relevant card and select the [Card Details] Tab
8. Select the custom list value
9. Click on [OK]

How to create a contact log entry

1. Go to Card File → Cards List
→ *The Cards List screen opens*



2. Open the relevant card and select the [Contact Log] Tab
3. Click on [New Log Entry]
→ *The Contact Log entry screen opens*

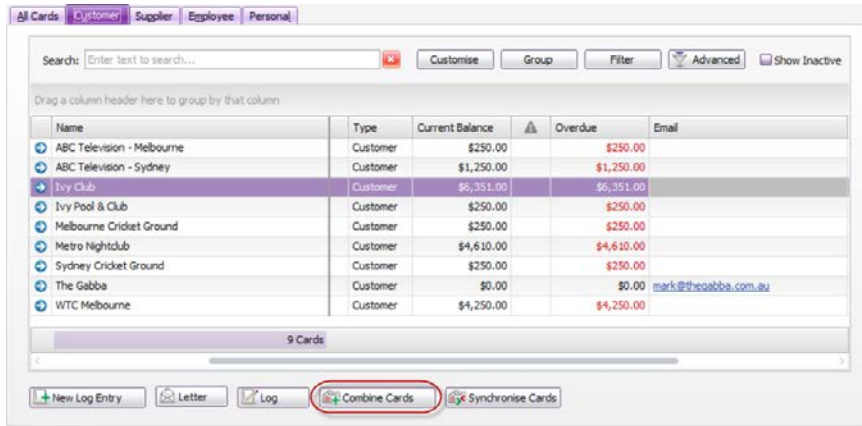


4. In the **Notes** field, enter the card's contact note
5. Click on [Record]
→ *The note is saved to the card*

How to combine cards

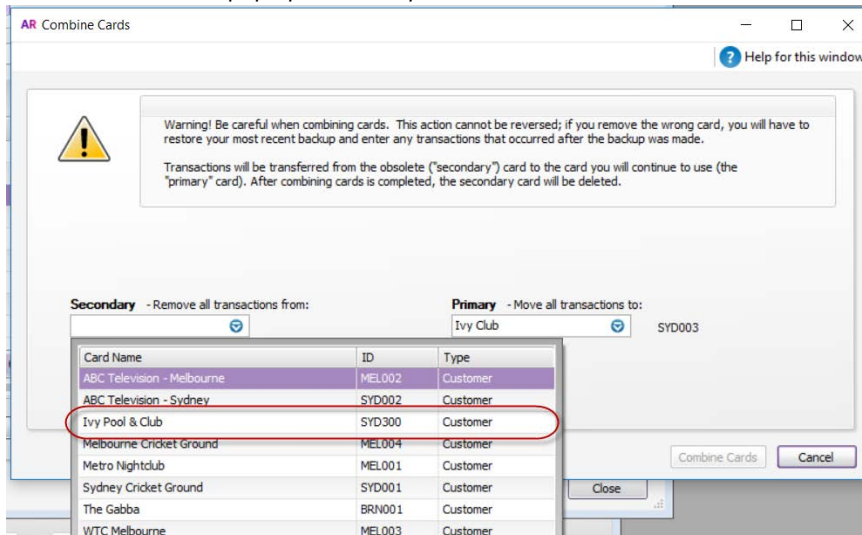
1. Go to Card File → Cards List

→ *The Cards List screen opens*



2. Select the Primary Card and click on [Combine Cards]

→ *The Combine Cards pop up window opens*



3. From the Secondary field, select the card you wish to delete

4. Click on [Combine Cards] → [OK]

→ *The two cards and relevant transactions are merged*

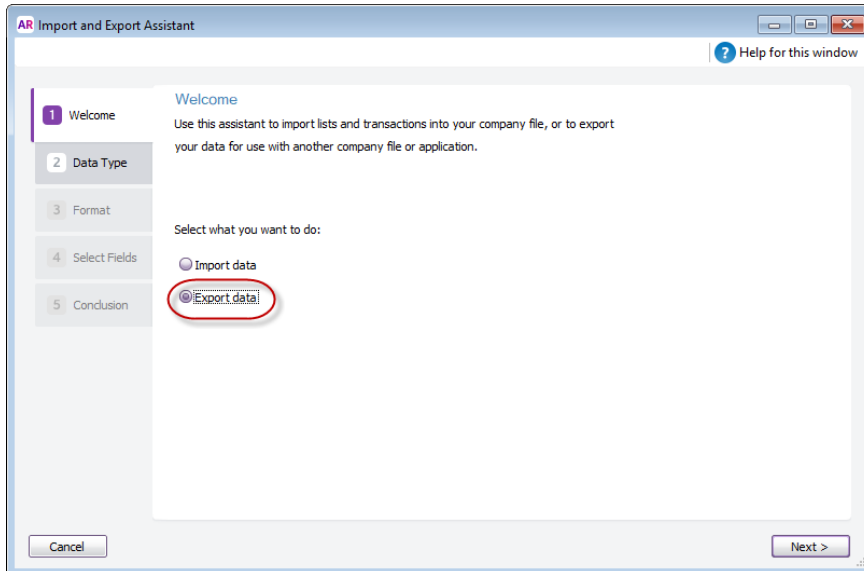
Note: The transaction details for the secondary card, including outstanding balances, are merged to the primary card. The secondary card is then deleted.

How to export cards from MYOB AccountRight to Excel

EXPORT CARDS OUT OF MYOB

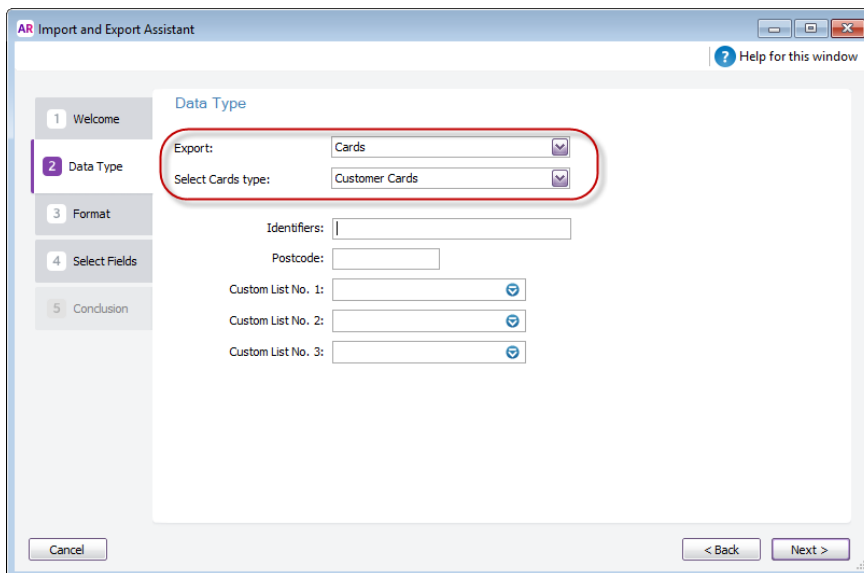
1. From the MYOB Command Centre click on File → Import/Export Assistant

→ *The Import and Export Assistant Wizard screen opens (Step1 – Welcome)*



2. Select [Export Data]

→ *Step 2: Data Type*



3. Select the following

Export

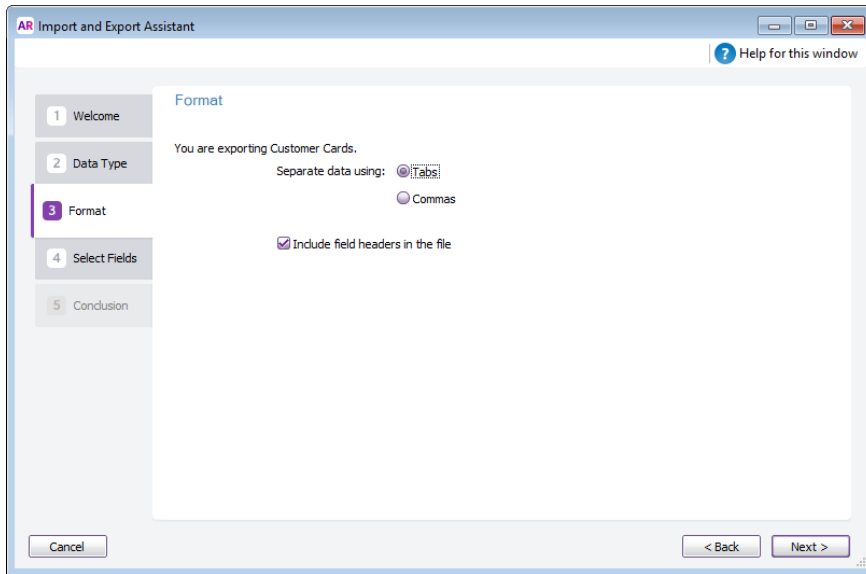
→ Cards

Select Card Type

→ Customer/Supplier/Employee Cards

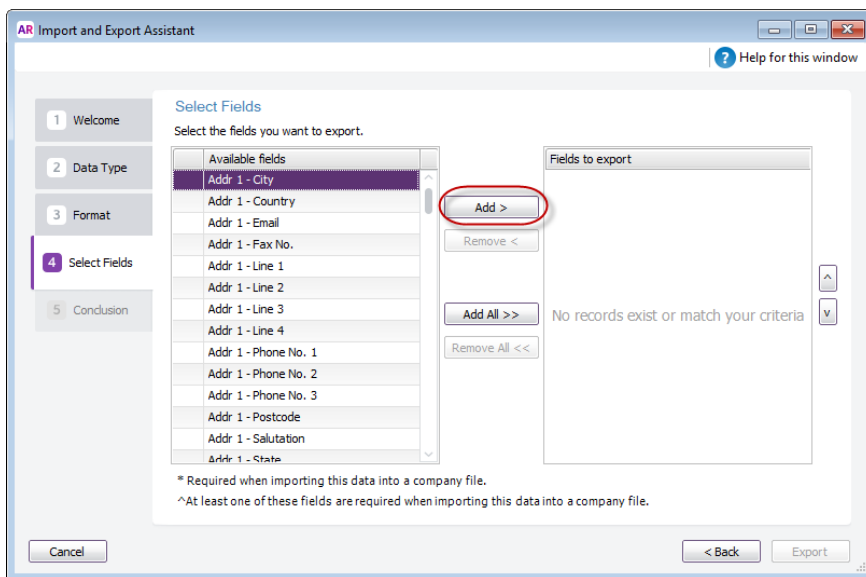
4. Click on [Next >]

→ Step3: Format



5. Do not alter the default format settings, click on [Next >]

→ Step 4: Select Fields



6. Click on either:

[Add All >>]

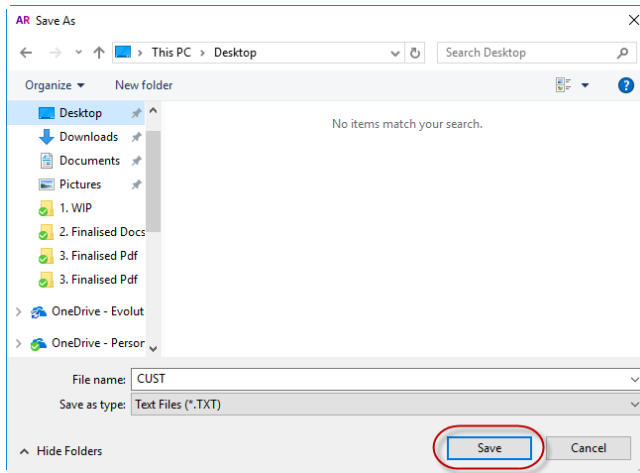
→ to add all card fields

[Add >>]

→ to add specific fields

7. Click on [Export]

➔ The Save As Screen opens

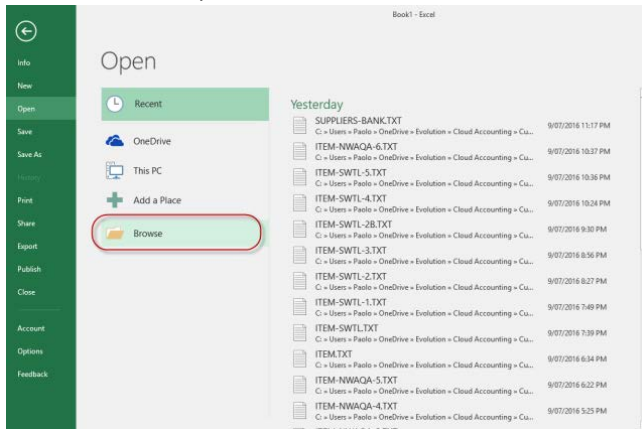


8. Select a folder where to save the file in your computer and then click on [Save]

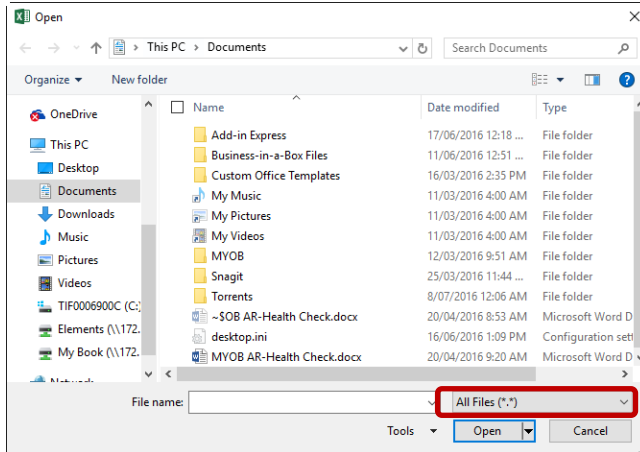
➔ The file is saved as a Text(.txt) file

OPEN THE MYOB EXPORT DATA FILE IN MS EXCEL

1. Open MS Excel
2. Click on File → Open → Browse

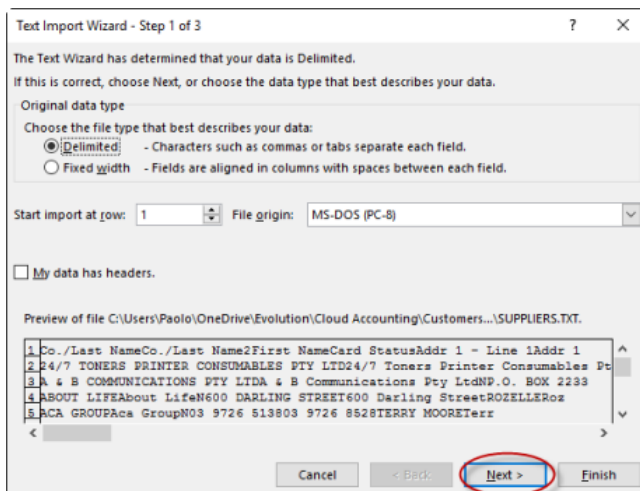


➔ The Excel Browse screen opens



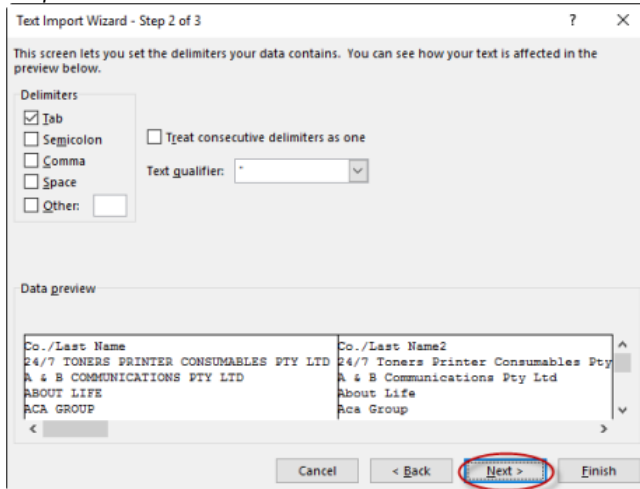
3. Ensure you change the file type selection from All Excel Files to **All Files**
4. Find the export (.txt) file and then click on **[Open]**

➔ The Import data wizard screen opens: Step 1



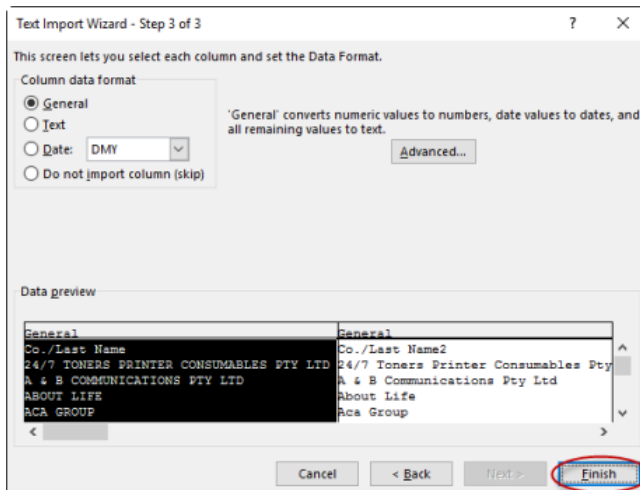
5. Click on **[Next >]**

➔ Step 2



6. Click on [Next >]

➔ Step 3



7. Click on [Finish]

➔ *The data populates in Ms Excel*

8. Click on File ➔ Save As and save the file as an MS Excel Workbook